LEADING IPTs -

HOW TO GET STARTED

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John Kelley

Opening Thoughts…

- All team members are <u>NOT</u> created equal (in terms of ability, experience, workload, etc.)

- No two teams are completely alike.

- There is <u>no checklist</u> to follow to achieve effective team performance.

- If you change one person on the team, you have a new team

- Teams involve work processes and interpersonal processes; you can't focus on one to the exclusion of the other.

External Environment
- _Stakeholders_
- _Other Systems_
- _Policy/Regs_
- _Trends_
- _Organization_

T E A M

Transformation Processes

Technical   Social

OUTCOMES

INPUTS

OUTPUTS

* Requirements
* People
* Resources
* Technology
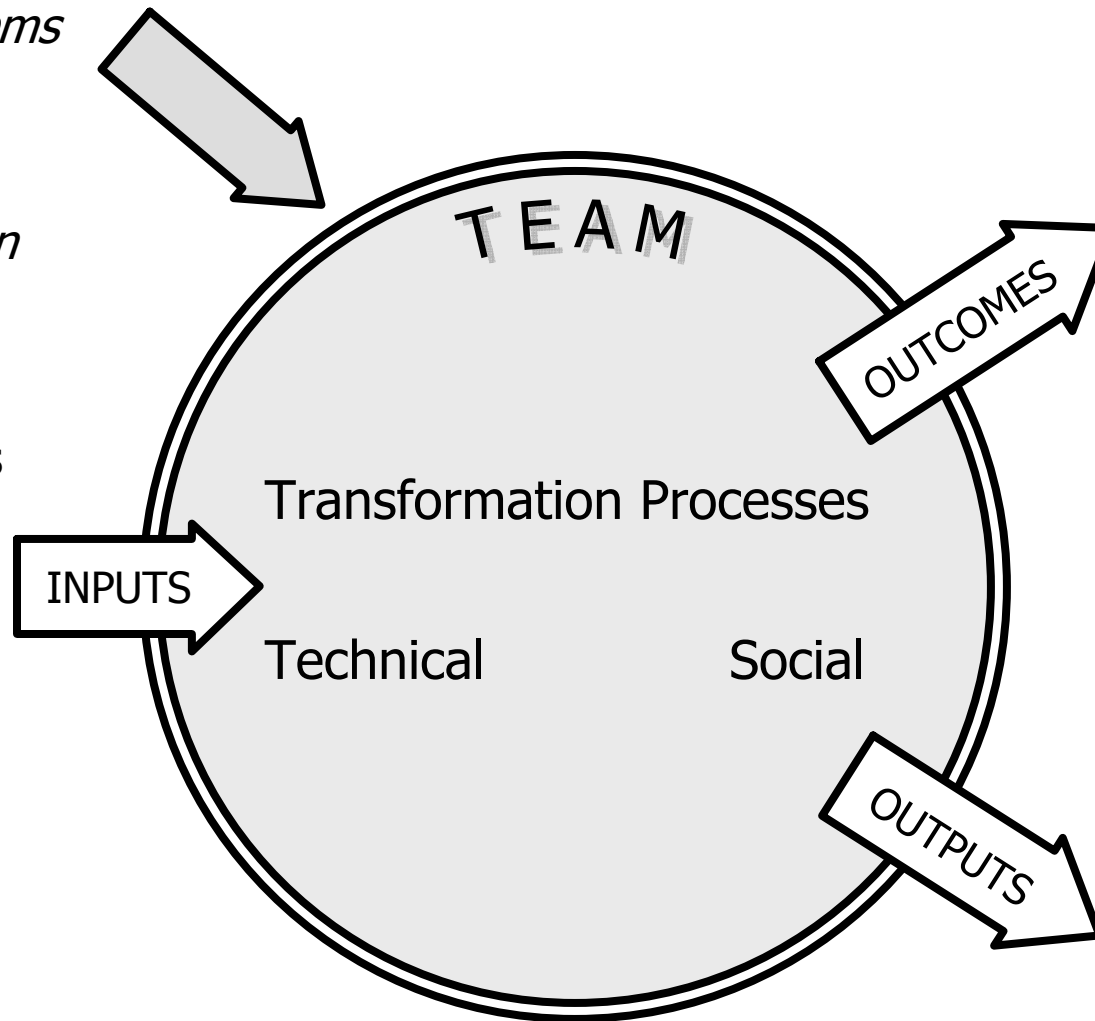
* Better/Faster/ Cheaper
* Satisfaction
* Learning

* Deliverable(s)

Systems Model for Teams

Before You Get Started...

- Is a team appropriate?

- What is its intended purpose?

- How many team members should you have?

- What functional areas should be represented?

- What skills/knowledge are required?

- Who will be on the team?

Getting the Team Going…

- Provide a link to the customer

- Clearly define and agree on the team's purpose

- Determine the team's goals and objectives

- Determine the critical success factors to enable you to meet the goals

- Define the team's responsibility, authority, and accountability

Getting the Team Going…

- Identify and assign key team roles

- Define the processes the team will use

- Develop/finalize a team charter

- Conduct training as a team

- Obtain commitment from team members

- Energize team members

Customer Focus

- Who will use the product/service?

- What do they need/want?

- How can the team best meet their needs/wants?

- How will they benefit from the team's output?

- Is the customer part of the team?

- Team Leader needs to emphasize importance of Customer Focus

Purpose

- Why does the team exist?

- If the team is disbanded, what will be missing?

- What is the output of the team?

- How does the team influence that output?

Team Goals

- What is the team trying to accomplish in meeting those objectives?

- What outcomes does the team seek?

- May be:

  - Product-related (e.g., budgeted cost, life cycle cost, schedule, performance)

  - Process-related (e.g., team meeting effectiveness, action item tracking)

  - Team performance related (e.g., team communication, conflict resolution, individual contribution)

What are "Critical Success Factors"?

The things your team must do that will *cause* effective performance.

Examples of Critical Success Factors

We need to:

- Maintain a strong customer focus

- Conduct appropriate team training

- Have clearly defined authority

- Use well-defined processes

- Have top-level support

- Use automated software tools to enhance our processes

- Be collocated

- Recognize the TEAM for its performance

Team Member Roles

Examples:

Team Leader

Facilitator

Record Keeper

Time Keeper

Graphics

R – A – A

Responsibility

- Assignment for completing a task

Authority

- Ability to make decisions and take action to achieve objectives

Accountability

- Acceptance of consequences of decisions/actions

Problem Solving Process

- Clearly Define the Issue/Problem
    - Determine Objectives of Resolving the Issue/Problem
    - Collect Data
    - Define Assumptions
- Generate Alternatives
- Evaluate the Alternatives
- Select an Alternative
- Develop a Plan of Action for Implementation
- Implement the Selected Alternative
- Monitor the Progress

Decision Making

- How will the team make decisions?
  - Unilateral
  - Majority
  - Consensus
  - Unanimous
- Decision Making Techniques/Tools (examples)
  - Decision Trees
  - Color Codes
  - Weighted Scoring
  - Multiattribute Utility Functions

Team Meetings

- Best guidance is: when <u>required</u>

- Regular status meetings (weekly, bi-weekly, etc.) should be short in duration

- All meetings should have a purpose and an agenda

- Stick to scheduled start and end times

- Record/distribute meeting minutes

Team Communication

- How will team members communicate with each other?

- How often should team members communicate?

- What factors influence communications?

- What forms of communication are most effective?

- How do we avoid common pitfalls?

Type of Communication vs Context

	Words	Control over Format	Voice Tone	Immediate Feedback	Non-Verbal Cues	Environ-mental Cues	Direct Physical Exchange	Informal Contacts
Person-to-Person	▓	▓	▓	▓	▓	▓	▓	▓
Video Conference	▓	▓	▓	▓	▓	▓		
Phone	▓	▓	▓	▓				
Voice Mail	▓	▓	▓					
Fax & Groupware	▓	▓						
E-mail	▓							

Source: *Global teams Online,* Meridian Resources, 2001

Operating Agreements

- Agreed upon guidelines for individual and team behavior
  - Describe how team members will interact
  - Describe what processes they will use
  - Describe what they expect of one another
- Can be very effective in helping to manage conflict and capitalize on the diversity of ideas, experience, and skills; instead of being dragged down by them
- To be effective, they must be enforced
- All team members, not only the leader, are responsible for enforcement

Examples of Operating Agreements

- Start meetings on time/end on time

- Send meeting agendas to all team members 24 hrs prior to meetings

- Don't shoot the messenger

- Attack the idea not the person

- Only one person speaks at a time

- Listen while others are speaking

- Follow through on commitments/action items

- No one person dominates discussions

- No long-winded speeches

- Consensus decisions are preferred; fallback is team leader decides

- Collaborate -- strive for win-win

- Have fun!

Team Charter

Captures the key aspects of why the team is established and what is expected from it, such as its purpose (mission), descriptions of products and deliverables, objectives, composition, responsibility, authority, and accountability.

Sample template included as a handout.

Team Training

- Should be done as early as possible

- Should be done as an intact team

- Introductions/ice breaker (if first meeting)

- Discovering different approaches to communicating / problem solving

- Conflict resolution

Commitment/Energy

How do you develop commitment and energy in team members?

- Why is this project important?

  - To our customer?

    - What will this product/service mean to the customer?

    - How will it help them do their job better?

    - What's wrong with how they do it now?

  - To me?

    - How does this align with my interests?

    - How does this support my career goals?

    - Why should I care how the customer does their job?

Team Performance

BEFORE YOU START
- Is a team appropriate?
- Purpose?
- How many members?
- What functional areas?
- Who?

LEADERSHIP

PURPOSE

CUSTOMER REQUIREMENTS

GETTING STARTED
- Introductions
- Customer Requirements
- Purpose
- Goals/Objectives
- Critical Success Factors
- Responsibility
- Authority
- Accountability
- Roles
- Processes
- Operating Agreements
- Charter
- Team Training

EXECUTING

PRODUCT

FEEDBACK